



## Is PRCF the Right Fit for Your Clients?

**YES. If your client wants to:**

- Give back to the Pottstown or Tri-County region
- Include meaningful charity in their estate plan
- Involve children and grandchildren in giving decisions
- Address community needs they're passionate about
- Establish a private foundation
- Make the most of a business sale or inheritance
- Express how deeply they care about their community



## Why Partner with Us?

### Local Knowledge

Since 2003, we've learned, and continue to learn, which programs deliver results and which community needs are most urgent.

### Professional Expertise

We understand the intersection of wealth management and philanthropy and can complement your expertise.

### Relationship-Focused

Whether a client gift is \$100 or \$1 million, we provide the same personal attention and commitment to their charitable vision.

## Help Your Clients Fulfill Their Charitable Passions

If your clients are open to discussing philanthropy, we can help make those conversations easier and more productive.

Our consultations are completely confidential, free, and without obligation. We can meet with you privately or join a client meeting, whatever works best for your practice.

Together, we can help your clients create the legacy they want, for the community they love.



[Linkly.link/2Envd](https://linkly.link/2Envd)



**Pottstown Regional  
Community Foundation**  
Connecting Generosity with Community Needs

**Contact Us Today:**

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## Your Partner in Building Client Legacies



**Pottstown Regional  
Community Foundation**  
Connecting Generosity with Community Needs

## Helping You Deliver More

Your clients trust you with their wealth, and many seek your guidance on how to best carry out their charitable intentions.

The Pottstown Regional Community Foundation (PRCF) is your local partner in turning those philanthropic aspirations into strategic, tax-advantaged giving that creates lasting change.



**22+**  
Years

Since 2003, we've been the bridge between generous hearts and community needs in the greater Pottstown region. As a 501(c)(3) community foundation, we connect charitable giving with the most promising opportunities in education, economic development, and social services.

## Services that Honor Wishes and Maximize Impact



### FLEXIBLE SOLUTIONS

#### RA/QCDs/Retirement Gifts

QCDs can be one of the most tax-efficient ways to make a charitable donation. The donor must be over 70 ½ and make the gift directly to the 501 (c) (3) charity from their IRA.

#### Donor-Advised Funds (DAFs)

A DAF allows your client to make a charitable contribution, receive an immediate tax deduction, and recommend grants over time. They can name successor advisors (such as children), remain anonymous if they wish, and support the causes that matter to them, when they're ready.

#### Endowment

An endowment creates a permanent legacy. The principal remains invested, and a portion of the earnings is granted annually—forever—based on your client's wishes. It's a powerful way to support their favorite causes in perpetuity.

#### Legacy & Endowment Planning

Help clients create a permanent legacy through bequests, estate gifts, and endowed funds. Their charitable assets grow over time, providing a lasting resource for the causes they care about most.

#### Memorial & Honor Funds

A meaningful way to celebrate a loved one's life and values is through ongoing charitable funds. Family members receive regular reports on fund activity, providing comfort and satisfaction for years to come.

#### Life Insurance Strategies

An affordable path to significant charitable impact. Whether naming PRCF as beneficiary or donating an existing policy, your clients gain tax benefits while meeting their philanthropic objectives.



### ADVANCED STRATEGIES

#### Private Foundation Services

Is your client considering a foundation? We can help with grantmaking strategies and facilitate the transition to donor-advised funds when complexity outweighs benefits. A community foundation can be an excellent partner for families who want to dissolve a private foundation while ensuring their philanthropic goals continue to be met effectively and efficiently.

#### Business Planning

Maximize philanthropic opportunities in business sales, advise on using privately-held stock for charitable purposes, and integrate giving into family business succession plans.

#### Family Philanthropy

Engage multiple generations in meaningful giving. We help families create shared values around philanthropy and provide ongoing education for younger family members.

